

Instructions for Completing the Paid Lunch Equity Tool SY 2013-2014

Schools participating in the National School Lunch Program must ensure sufficient funds are provided to the nonprofit school food service account for lunches served to students not eligible for free or reduced price meals. There are three options available to meet this requirement: 1) through prices charged for “paid” lunches; 2) through contribution of other non-federal sources or 3) combination of pricing and contribution of non-federal sources. To assist schools in determining their compliance; the SY 2013-2014 Paid Lunch Equity (PLE) tool was provided by USDA. Schools are required to complete the tool annually. The USDA memorandum (SP 25-2013) and tool may be found on the Nutrition Services web page at:

<http://www.education.ne.gov/NS/NSLP/Reauth/PLE/PLE.html>

Collect the following information before completing the PLE tool:

1. Number of paid lunches sold in October 2010 for each of your paid lunch prices. For example, if your district has a different paid lunch price for elementary and high school you will need the number of paid lunches sold at the elementary price and the number of paid lunches sold at the high school price. (Do not include reduced price or adult meals, or breakfast.)
2. Number of paid lunches sold in October 2012 for each of your paid lunch prices.
3. For option 2 & 3: If non-federal contributions are made to the non-profit school lunch fund you will need the total number of paid lunches sold in 2012. *Please note that the non-federal contribution must have been earmarked in your school board minutes as “support of paid lunch equity.”*

You are now ready to begin working in the tool. Click on the URL above to access the PLE tool. Click on the 2013-2014 Calculation Tool.xls and save a copy to your computer hard drive.

Paid Lunch Equity (PLE)

Lunch Pricing - School Food Service Account Revenue

Interim Rule National School Lunch Program: School Food Service Account Revenue Amendments Related to the Healthy, Hunger-Free Kids Act of 2010. *Federal Register Vol. 76 No. 117 June 17, 2011.*

- Paid Lunch Equity:School Year 2013-2014 Calculations Tool

- [SP 25-2013 Memorandum.pdf](#)

- [2013-2014 Calculation Tool.xls](#)

- [SP19-2013 Paid Lunch Equity: School Year 2013-2014 Calculations.pdf](#)



Nutrition Services strongly encourages schools to keep copies of the PLE tool from year to year on their computer.

Please note:

- To make it easier to follow instructions, row numbers are used. Once you open the Excel file, look at the left hand margin and you should see numbers associated with each row. When the instructions state “row X,” the cell that the instructions are referring to will be located in that numbered row.
- The worksheet is formatted so that a district may only enter information in the peach/orange colored cells. As data is entered into these cells the worksheet performs calculations and numbers appear in the appropriate white cells.

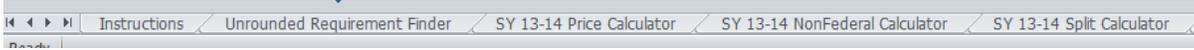
Step 1	
Enter the SY 2012-13 Unrounded Price Requirement in the box below	SY 2013-14 Weighted Average Price Requirement
This is can be found in Section 1: Box A of the SY2012-2013 REPORT from the SY 2012-13 tool or you may find it below (Price 2)	Requirement price to the nearest cent
Enter data in peach colored cells	\$ -
Note: Above prices are based on adjusting SY 2012-2013 price requirement by the 2% rate increase plus the Consumer Price Index (2.93%)	



- The worksheet has multiple tabs and they may not all be visible. If you do not see a tab that is referred to in the instructions; use the navigation arrows located to the left of the tabs. Clicking these directional arrows will allow you to scroll through the tabs for each of the worksheets.



Open the saved PLE Tool from your hard drive. Begin working in the “Unrounded Requirement Finder Tab” by clicking on this tab at the bottom of the worksheet:



OPTION #1 PAID LUNCH PRICE

- Click on the link “If you do not know your SY2010-2011 Weighted Average Price [CLICK HERE.](#)”



- Enter the number of paid lunches sold at each of your price levels for October 2010 and the corresponding paid lunch price into the table.

- After all the data has been entered, the worksheet indicates your 2010-2011 weighted average price (Row 18). Remember this number (or copy it) because this number is entered on the “Unrounded Requirement Finder” tab.

Monthly # of Paid Lunches	Paid Lunch Price	Monthly Revenue	SY 2010-11 Weighted Average Price
444	\$ 1.25	\$ 555.00	
666	\$ 1.30	\$ 865.80	
		\$ -	
		\$ -	
		\$ -	
		\$ -	
		\$ -	
		\$ -	
		\$ -	
		\$ -	
TOTAL	1,110	\$ 1,420.80	1.28

1.28 is the SY2010-2011 weighted average price.
Enter this price in the first data entry box on the

[Click to go back to Unrounded Requirement Finder](#)

[Go to instructions](#)

Click this link to return to previous tab

- Click on the “Click to go back to Unrounded Requirement Finder” OR click the tab labeled “Unrounded Requirement Finder.”



- Find the peach/orange colored cell in row 15. Enter your 2010-2011 weighted average price that was just determined. This action will populate "Price 2: SY2012-2013 Requirement price to the nearest cent" in the yellow cell at the end of Row 15.

Complete if you do NOT know your SY2012-2013 Unrounded Price Requirement		
Annual Unrounded Requirement Finder		
Enter the SY 2010-11 Weighted Average Price below <i>** The weighted average price for SY 2010-11 is the weighted average of all paid lunch prices charged in the SFA</i>		
SY 2010-11 Weighted Average Price	Unrounded Price Requirements	
	Price 1: SY 2011-2012 Requirement price to the nearest cent	Price 2: SY 2012-2013 Requirement price to the nearest cent
\$ 1.28	\$ 1.32	\$ 1.38

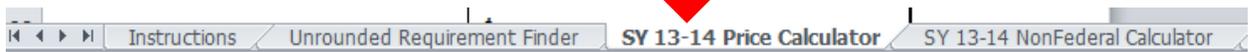
- Enter this amount (Price 2) into the peach/orange colored cell in Row 7. This action will populate the "SY2013-14 Weighted Average Price Requirement to the nearest cent" in the white cell at the end of Row 7.

Step 1	
Enter the SY 2012-13 Unrounded Price Requirement in the box below	SY 2013-14 Weighted Average Price Requirement
<i>This can be found in Section 1: Box A of the SY2012-2013 REPORT from the SY 2012-13 tool or you may find it below (Price 2)</i>	Requirement price to the nearest cent
\$ 1.38	\$ 1.45

- Next either click on the link "Click here to go to SY 2013-14 Price Calculator" or

[Click here to go to SY 2013-14 Price Calculator](#)

Click the SY 13-14 Price Calculator Tab:



- Enter the number of paid lunches sold at each of your price levels for October 2012 and the corresponding paid lunch price into the table. After all the data has been entered, the worksheet indicates your "Total Price Increase for SY2013-14" in Row 30 and the "Required price increase for SY 2013-14 (with 10 cent cap)" in Row 34.

If your district will increase the paid lunch price and does not plan to contribute non-federal funds to the non-profit foodservice account, you are done entering data.

Click on the "Go to SY2013-2014 Report" link OR click on the "SY2013-2014 REPORT" Tab.



SY 2012-13 Weighted Average Price Calculator			
Enter the paid prices and number of paid lunches sold at each price for October 2012.			
Monthly # of Paid Lunches	Paid Lunch Price	Monthly Revenue	SY 2012-13 Weighted Average Price
1. 478	\$ 1.35	\$ 645.30	
2. 699	\$ 1.45	\$ 1,013.55	
3.		\$ -	
4.		\$ -	
5.		\$ -	
6.		\$ -	
7.		\$ -	
8.		\$ -	
9.		\$ -	
10.		\$ -	
TOTAL	1,177	\$ 1,658.85	\$ 1.41

Note: SY 2012-13 Weighted Average Price equal to or above \$2.59 are compliant for SY 2013-14. \$2.59 is the difference between the Free and Paid reimbursement rates for SY 2012-13.

Total Price Increase for SY 2013-14	\$ 0.04
Required price increase for SY 2013-14 (with 10 cent cap)	\$ 1.45
Remaining increase carried forward to SY 2014-15	\$ -
Remaining credit carried forward to SY 2014-15	\$ -

[Go to SY2013-2014 Report](#)

9. In Row 17 click the drop down arrow in the peach/orange colored cell and select “Increase SY 2013-2014 average weighted price.” Print the report page and place the copy in your school lunch file and keep for 3 years plus the current year. *Note: Districts are required to print the Report Page; however, you may want to print a copy of each tab completed for future reference. Save the PLE Calculator file on your computer.*

10	Section 1: SY2013-2014 Weighted Average Paid Price Requirements	
11	A. SY 2013-14 Weighted Average Price Requirement*:	\$1.45
12	<i>*This price will be entered into the SY 2014-2015 tool to determine the SY2014-2015 weighted average price requirements</i>	
13	B. Optional Price ROUNDED DOWN to nearest 5 cents:	\$1.45
14		
15	Section 2: Amounts Carried Forward to SY 2014-2015	
16	Select the SY 2013-2014 method used to ensure sufficient funds are provided for PAID Lunches	
17	Increase SY2013-2014 average weighted price	▼
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19	Average Weighted Price Adjustments	
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21	A. Remaining increase carried forward to SY 2014-15:	\$0.00
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23	B. Remaining credit carried forward to SY 2014-15:	\$0.00
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OPTION #2 CONTRIBUTION OF NON-FEDERAL SOURCES

Financial support from non-Federal sources must be cash for direct support of paid lunches, including but not limited to:

- Per-meal reimbursements for paid lunches provided by States, counties, school districts, and others;
- Funds donated by organizations, such as school-related or community groups to support paid lunches;
- Any portion of State revenue matching funds for breakfast and lunch;
- Any proportion attributable to paid lunches from direct payments made from school district funds to support the lunch service

To locate State revenue matching funds for breakfast and lunch, you will need to access Nutrition Services’ CNP web site. On the System Information page in the middle section is a green go button marked “Transaction History.” The words “NSL State Lunch” and “NSL State Breakfast” appear in the “Account Description” column. The amounts in the column marked “Trans Amount” are the State match your district received.

System Information

System		
System Name	Agreement Number	Program Year
Registration	00.0000	2014
Program Year: 2014		
System (Sponsor) Profile		
Program Application	INCOMPLETE	9 Error(s)
Site Applications	0 Site Application(s)	
Authorized Signers	0 Authorized Signature(s)	
Supporting Documents	0 Complete 3 Incomplete	
Menu Certification	Not Started	
Meal Pattern Certification	Not Started	
Attestation	Not Started	
Additional		
Health Inspection - Due October 15	Health Inspection not required	
Financial Statement - Due July 15	Not Required	
Verification - Due November 15	Not Started	
Transaction History Report		
Qualified Student List Directly Certified as Free	No Student Data available at this time	
Notes	No Note(s) exist	
Attachments	No Attachment(s) exist	

Trans Amount	Account Description
\$235.43	NSL State Lunch
(\$235.43)	NSL State Lunch
\$750.76	NSL State Breakfast
(\$750.76)	NSL State Breakfast



If non-federal contributions are made from the general fund to the non-profit school lunch fund **and** the contribution has been earmarked in your school board minutes for “support of paid lunch equity,” continue with the following steps:

1. Complete steps 1 – 8 described above under Option #1.

2. Click on the “SY13-14 NonFederal Calculator” Tab. On Row 12 enter the SY2012-2013 Weighted Average Price in the peach/orange colored cell. Note: This price has already been calculated and can be found on the “SY13-14 Price Calculator” Tab.

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Enter the total number of paid lunches sold for the 2012-2013 school year in the peach/orange cell in Row 17.

Enter the amount of Non-Federal Source Funds Contributed for SY 2011-12 and SY 2012-13 in the peach/orange cell in Row 23. This action populates the amount of “Annual Non-Federal Source Contribution Requirement for SY 2013-14” in the white cell of Row 23. This is the minimum amount a district will need to transfer into the non-profit foodservice account.

Current Weighted Average Paid Price	
Enter in the current weighted average paid lunch price. <i>Note: If SFA did not change the weighted average paid lunch price in SY2011-2012 or SY2012-2013, enter the SY2010-11 weighted average price. Otherwise, click the link below.</i>	
\$	1.41
Click here to determine SY2012-2013 weighted	

Non-Federal Source Contribution Calculator for SY 2013-14		
Enter the total paid lunch count (for all prices). <i>** Annual Non-Federal Source funds for SY 2013-2014 are estimated based on the ACTUAL lunch count entered below.</i>		
Enter annual # of Paid Lunches **	TOTAL Price Increase for SY 2013-14	TOTAL SY 2013-14 Annual Non-Federal Source Contribution
109,593	\$ 0.04	\$ 4,383.72
<i>Note: Total price increase for SY 2013-2014 is based on the difference between the weighted average price entered above and SY 2013-2014 rounded DOWN requirement.</i>		

Enter total amount of Non-Federal Source Funds Contributed for SY 2011-12 and SY 2012-13	Annual Non-Federal Source Contribution Requirement for SY 2013-14
\$ 986.19	\$ 3,397.53

3. Click on the “Go to SY2013-2014 Report” link OR the “SY2013-2014 REPORT” Tab. In Row 17 click the drop down arrow in the peach/orange colored cell and select “Contribute Non-Federal Sources for SY 2013-2014.” Print the report page and place the copy in your school lunch file and keep for 3 years plus the current year. *Note: Districts are required to print the Report Page; however, you may want to print a copy of each tab completed for future reference. Save the PLE Calculator file on your computer.*

Section 2: Amounts Carried Forward to SY 2014-2015	
Select the SY 2013-2014 method used to ensure sufficient funds are provided for PAID Lunches	
Contribute Non-Federal sources for SY2013-2014	
Average Weighted Price Adjustments	
A. Remaining increase carried forward to SY 2014-15:	N/A
B. Remaining credit carried forward to SY 2014-15:	N/A
Non-Federal Source Contributions	
C. Remaining Annual Non-Federal Source Contribution carried forward to SY 2014-15:	\$0.00
D. Remaining Credit carried forward to SY 2014-15:	\$0.00

OPTION # 3 COMBINATION OF PRICING AND CONTRIBUTION OF NON-FEDERAL SOURCES

School districts also have the option to increase their paid lunch price and apply non-federal contributions. This is accomplished by using the SY13-14 Split Calculator.

1. Complete steps 1 – 8 described above under Option #1.
2. Click on the “SY 13-14 Split Calculator” Tab. Enter the number of paid lunches sold at each of your price levels for October 2012 and the corresponding paid lunch price into the table.

SY 2012-13 Weighted Average Price Calculator				
Enter the paid prices and number of paid lunches sold at each price for October 2012.				
Monthly # of Paid Lunches	Paid Lunch Price	Monthly Revenue	SY 2011-12 Weighted Average Price	
1. 478	\$ 1.35	\$ 645.30		
2. 633	\$ 1.45	\$ 917.85		
3.		\$ -		
4.		\$ -		
5.		\$ -		
6.		\$ -		
7.		\$ -		
8.		\$ -		
9.		\$ -		
10.		\$ -		
TOTAL	1,111	\$ 1,563.15	\$	1.41

Note: SY 2012-13 Weighted Average Price equal to or above \$2.59 are compliant for SY 2013-14. \$2.59 is the difference between the Free and Paid reimbursement rates for SY 2012-13.

3. Enter the amount your district plans to charge for paid lunches in SY 2013-2014 in the peach/orange cell (Row 38).

New Price Increase			
Enter the new price increase for SY2013-2014 to assist in meeting the requirement			
	\$	1.43	

Note: If your district has multiple prices, use the “Step 3 (Optional) Pricing Estimation Table” found on the SY 13-14 Price Calculator Tab to estimate your weighted average price for the new paid lunch price. Enter the estimated weighted average price into the peach colored cell in Row 38.

Step 3 (Optional)				
Pricing Estimation Calculator				
Below is a tool allowing users to manipulate prices to achieve the required new weighted average price.				
Monthly # of Paid Lunches	Paid Lunch Price	Monthly Revenue	Weighted Average Price	
1. 478	\$ 1.40	\$ 669.20		
2. 699	\$ 1.45	\$ 1,013.55		
3.		\$ -		
4.		\$ -		
5.		\$ -		
6.		\$ -		
7.		\$ -		
8.		\$ -		
9.		\$ -		
10.		\$ -		
TOTAL	1,177	\$ 1,682.75	\$	1.43

In this example only the elementary price increased 5 cents

4. Enter the total number of paid lunches sold for the 2012-2013 school year in the peach/orange cell in Row 43.

Enter the amount of Non-Federal Source Funds Contributed for SY 2011-12 and SY 2012-13 in the peach/orange cell in Row 48. This action populates the amount of "Annual Non-Federal Source Contribution Requirement for SY 2013-14" in the white cell of Row 48.

This is the minimum amount a district will need to transfer into the non-profit foodservice account.

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Non-Federal Source Contribution Calculator for SY 2013-14				
Enter the total paid lunch count (for all prices). ** Annual Non-Federal Source funds for SY2013-2014 are estimated based on the ACTUAL lunch count entered below				
Enter annual # of Paid Lunches **	Total required Price Increase	TOTAL SY 2013-14 Annual Non-Federal Source Contribution	Price Increase Requirement for SY 2013-14 (with 10 cent cap)	SY 2013-14 Annual Non-Federal Source Contribution (with 10 cent cap)
109,593	\$ 0.02	\$ 2,191.86	\$ 0.02	\$ 2,191.86
<i>Note: Total price increase for SY 2013-2014 is based on the difference between the weighted average price entered above and SY 2013-2014 rounded DOWN requirement.</i>				

Enter amount of Non-Federal Source Funds Contributed for SY 2011-12 and SY 2012-13	Annual Non-Federal Source Contribution Requirement for SY 2013-14	Remaining Annual Non-Federal Source Contribution carried forward to SY 2014-15	Remaining Credit carried forward to SY 2014-15
\$ 986.19	\$ 1,205.67	1,205.67	\$ -

5. Click on the "Go to SY2013-2014 Report" link OR the "SY2013-2014 REPORT" Tab. In Row 17 click the drop down arrow in the peach/orange colored cell and select "Both." Print the report page and place the copy in your school lunch file and keep for 3 years plus the current year. *Note: Districts are required to print the Report Page; however, you may want to print a copy of each tab completed for future reference.* Save the PLE Calculator file to your computer.

Section 2: Amounts Carried Forward to SY 2014-2015	
Select the SY 2013-2014 method used to ensure sufficient funds are provided for PAID Lunches	
Both	
<u>Average Weighted Price Adjustments</u>	
A. Remaining increase carried forward to SY 2014-15:	N/A
B. Remaining credit carried forward to SY 2014-15:	N/A
<u>Non-Federal Source Contributions</u>	
C. Remaining Annual Non-Federal Source Contribution carried forward to SY 2014-15:	N/A
D. Remaining Credit carried forward to SY 2014-15:	N/A
<u>Split Calculations</u>	
E. Remaining Annual Non-Federal Source Contribution carried forward to SY 2014-15:	\$1,205.67
F. Remaining Credit carried forward to SY 2014-15:	\$0.00

If you have any questions or problems while working in the PLE tool, please contact Nutrition Services at 402-471-2488 or 800-731-2233.